

CLAIMS

- 1 1. A computer-implemented method for creating reports from financial data in a
2 financial software application, the method comprising:
3 receiving a selection of a template to be used to create a report, the template
4 including layout information and content field information;
5 receiving financial data from a data source; and
6 applying the received layout information and received content field information
7 to the received financial data to generate a report, the report having a layout
8 specified by the layout information, and including content associated with
9 the content field information.
- 1 2. The method of claim 1 further comprising outputting the report to an output
2 device.
- 1 3. The method of claim 2 wherein the output device is a computer monitor.
- 1 4. The method of claim 2 wherein the output device is a printer.
- 1 5. The method of claim 2 wherein the output device is storage medium.
- 1 6. The method of claim 1 wherein the data source is a storage device.
- 1 7. The method of claim 1 wherein the selected template is selected using the
2 Internet.
- 1 8. The method of claim 7 further comprising storing the selected template
2 locally.

1 9. The method of claim 1, wherein the selected template includes version
2 information, and prior to applying the received layout information and
3 received content field information to the received financial data, the template
4 version is compared to a version associated with the received financial data
5 to determine whether the financial data is compatible with the selected
6 template.

1 10. The method of claim 9 further comprising:
2 responsive to a determination that the financial data is compatible with the
3 selected template, generating the report.

1 11. A computer-implemented method for creating reports from financial data in
2 a financial software application, the method comprising:
3 receiving a report, the report having a layout and content, the content associated
4 with at least one content field;
5 determining a structure of the report, the structure including the layout of the
6 report and each content field of the report; and
7 storing the structure as a template.

1 12. The method of claim 11 further comprising:
2 prior to storing the structure as a template, determining whether a user of the
3 financial software application has permission to store the structure as a
4 template.

1 13. The method of claim 12 further comprising storing the structure as a
2 template responsive to the user having permission.

1 14. The method of claim 11, further comprising:
2 prior to storing the structure as a template, determining that at least one content
3 field of the report is a unique content field; and
4 responsive to the at least one content field being a unique content field, not
5 storing the structure as a template.

1 15. A system for creating reports from financial data in a financial software
2 application, the system comprising:
3 a template data store for storing report templates, the report templates including
4 layout information and content field information used to generate a report;
5 a user data store for storing user financial data; and
6 a report engine , communicatively coupled to the template data store and the
7 user data store, for receiving template data from the template data store and user data
8 from the user data store, and for generating reports by applying the template data to the
9 user data.

1 16. A computer program product for creating reports from financial data in a
2 financial software application, the computer program product stored on a computer-
3 readable medium and containing instructions configured to cause a processor to execute
4 the steps of:
5 receiving a selection of a template to be used to create a report, the template
6 including layout information and content field information;
7 receiving financial data from a data source; and
8 applying the received layout information and received content field information
9 to the received financial data to generate a report, the report having a layout

10 specified by the layout information, and including content associated with
11 the content field information.

1 17. A computer program product for creating reports from financial data in a
2 financial software application, the computer program product stored on a computer-
3 readable medium and containing instructions configured to cause a processor to execute
4 the steps of:

5 receiving a report, the report having a layout and content, the content associated
6 with at least one content field;
7 determining a structure of the report, the structure including the layout of the
8 report and each content field of the report; and
9 storing the structure as a template.

1 18. A system for creating reports from financial data in a financial software
2 application, the system comprising:
3 first receiving means for receiving a selection of a template to be used to create a
4 report, the template including layout information and content field
5 information;
6 second receiving means for receiving financial data from a data source; and
7 applying means, coupled to the first receiving means and the second receiving
8 means, for applying the received layout information and received content
9 field information to the received financial data to generate a report, the report
10 having a layout specified by the layout information, and including content
11 associated with the content field information.

1 19. A system for creating reports from financial data in a financial software
2 application, the system comprising:
3 receiving means for receiving a report, the report having a layout and content,
4 the content associated with at least one content field;
5 determining means, coupled to the receiving means, for determining a structure
6 of the report, the structure including the layout of the report and each content
7 field of the report; and
8 storing means, coupled to the determining means, for storing the structure as a
9 template.